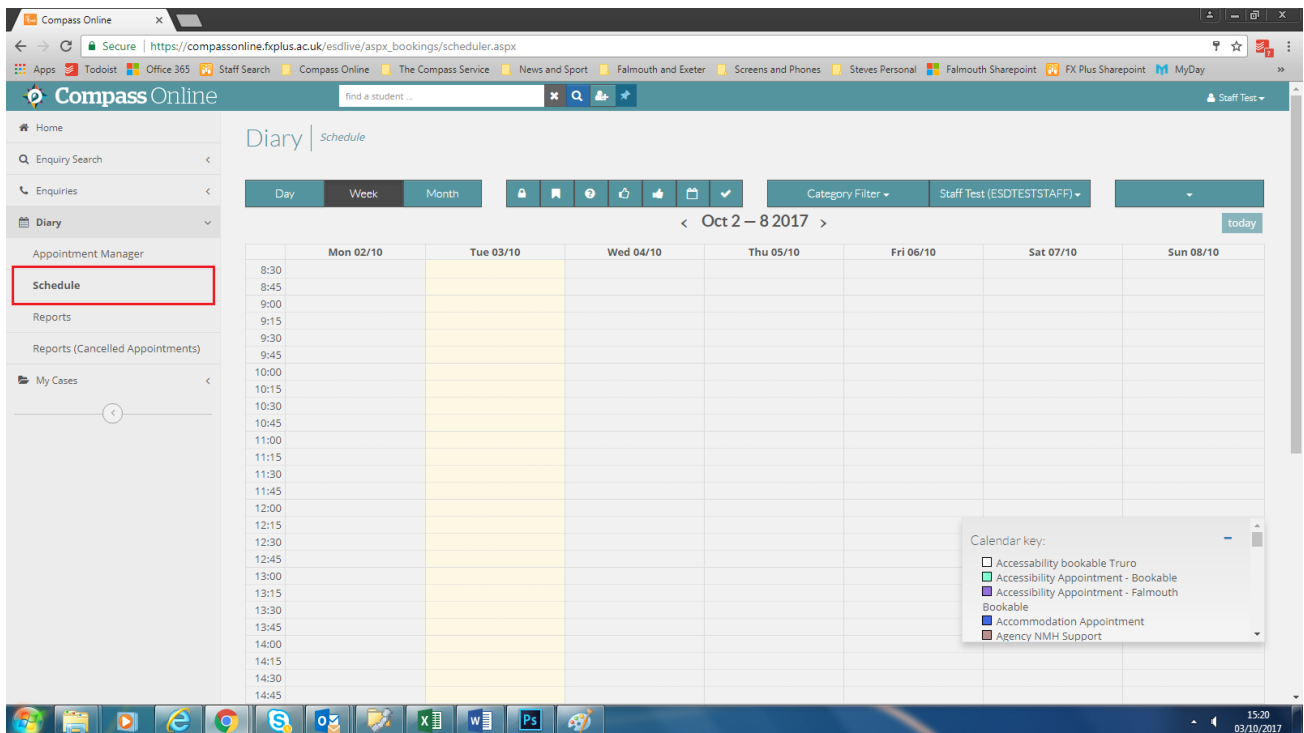


# How to: Book an appointment in your Compass Online calendar

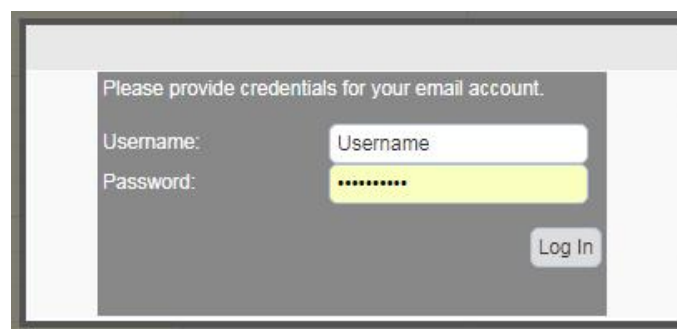
## Overview:

This guide demonstrates how you should book an appointment in to your calendar using Compass Online.

1. Book a room by contacting the Timetabling Team ([roombookings@fxplus.ac.uk](mailto:roombookings@fxplus.ac.uk)) or using the Room Bookings portal ([roombookings.fxplus.ac.uk](http://roombookings.fxplus.ac.uk)) as normal. (Please see guide on how to book rooms using the room bookings portal).
2. Login in to Compass Online at <https://compassonline.fxplus.ac.uk>. This will take you to your profile page. **Please note:** If you are experiencing problems logging in to the system please contact [servicedesk@fxplus.ac.uk](mailto:servicedesk@fxplus.ac.uk) or call 01326 213822.
3. Click on **Schedule** from the **Diary** option in the left-hand navigation menu.

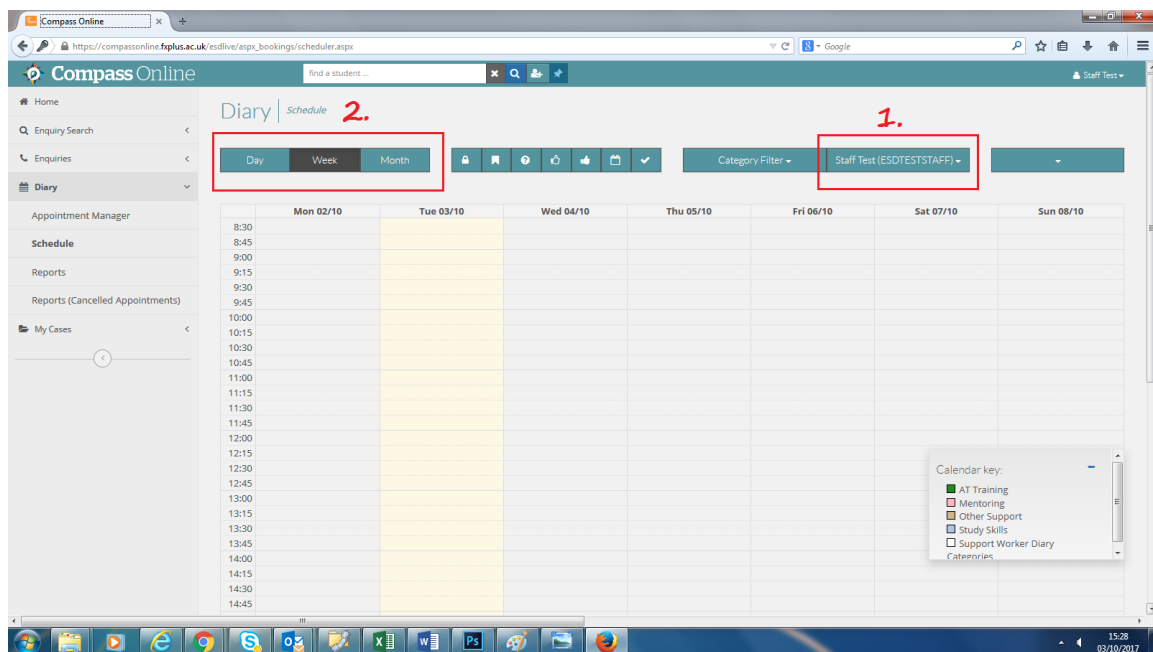


4. A new login pop up will appear – this allows users with a university Outlook inbox to synchronise their calendars. Re-input your username and password to bring up your calendar.



5. As default, Compass Online will display your personal calendar as shown in option 1. You can view your calendar by Day, Week or Month with the Week view shown as the default view (2.)

## How to: Book an appointment in your Compass Online calendar



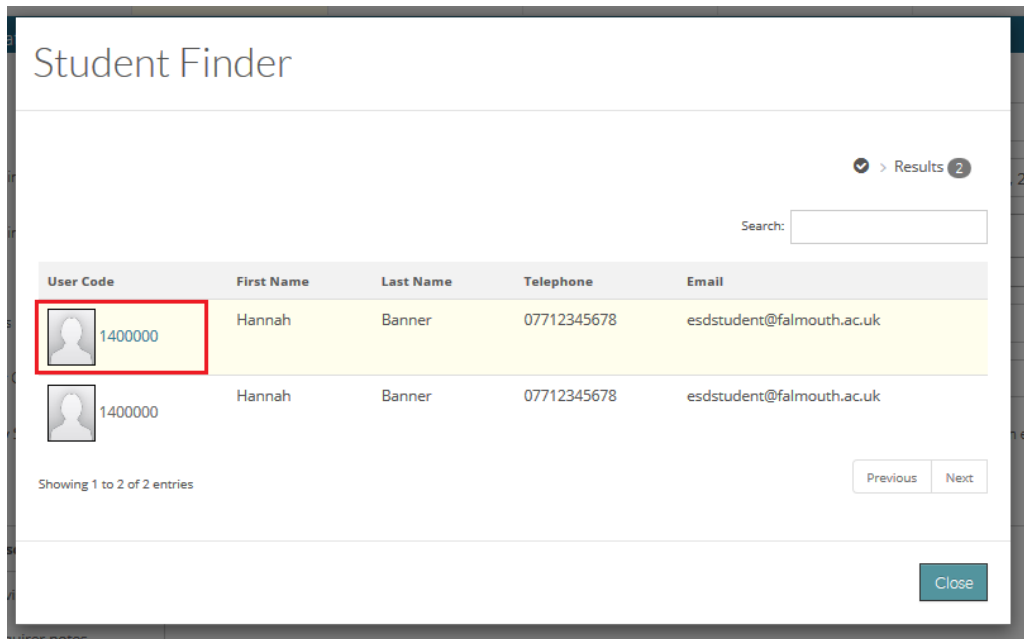
6. To book an appointment in your calendar, navigate to the day and time for which you would like to book an appointment and click within the calendar – this will display an appointment entry pop-up window.

7. The pop-up window will provide a list of basic options to book an appointment – you can display **more options** or **fewer options** by clicking in the bottom left corner of the pop-up box.

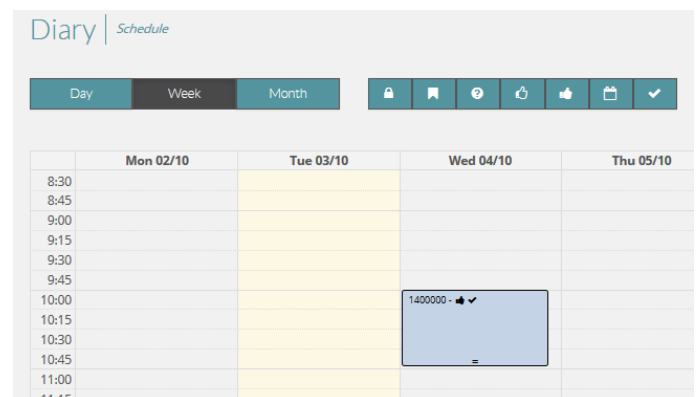
There are 5 important options that you need to select when booking an appointment:

## How to: Book an appointment in your Compass Online calendar

- a. **Appointment Title** – this is a general overview of the appointment.  
Within this box type the student’s name, the type of session and the location of the appointment. For example:  
**Joe Bloggs – Study Skills – Peter Lanyon Seminar 6**
- b. **Enquiry Category** – the type of session you are booking with the student.  
Choose from **Study Skills, Mentoring, AT Training, Other Support**.
- c. **Enquirer (student name)** – You will need to add the name of the student to the appointment.  
Click on the **Look up student** button and search using the fields available. Click on the student’s usercode to display their name in the appointment. **Please note:** There are two records displayed for the same student – this is perfectly normal and it doesn’t matter which option you select:



- d. **Appointment Start, End and Duration** – depending on where you selected in your calendar, the system will begin the appointment at that time. By default, it will create an appointment of 1 hour however you can change the slot length here.
  - e. **Staff** – as you are booking the appointment in to your own calendar the system will automatically select you as the staff member.
8. Select **Create Appointment**. The appointment will be added to your calendar. You can hover over the appointment to view the content or click on the appointment to make changes. Each appointment category (type) is represented by a different colour:  
**Study Skills, Mentoring, AT Training, Other Support**.



## How to: Book an appointment in your Compass Online calendar

9. When you have selected Create Appointment, both you (the staff member) and the student will receive an email notification of the appointment. The student's appointment notification will be sent to their university email address.

Should you wish to send the student a confirmation to their personal email address, please view the **How to: Initiate a message to a student using Compass Online** guide.

Hi \*DIARY\_NAME,


This message is confirming your booked support session:

<b>Appointment Type:</b>	*DIARY_CALL_CATEGORY
<b>Staff:</b>	*DIARY_STAFF
<b>Appointment Date:</b>	*DIARY_DATE
<b>Start Time:</b>	*DIARY_START
<b>End Time:</b>	*DIARY_END
<b>Location:</b>	*DIARY_ROOM
<b>Additional Info:</b>	*DIARY_TITLE

I'm looking forward to seeing you then.

Best wishes,  
\*DIARY\_STAFF

10. You can override the automatic email notifications by selecting the appropriate tick-boxes within the appointment-booking pop-up window:

Email generation   Check to override system email generation

Email Type  Staff  Callers

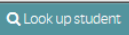
11. Within the appointment booking, you must select when an appointment is **confirmed** and whether it was **attended** by the student. There are two different icons that are used to represent this.

**Option 1.** Shows whether a student has confirmed the appointment. If you are booking a session for any time in the next 7 days this should be marked **lime green**. For any appointment bookings beyond the next 7 days you must wait until the student has confirmed before selecting this option.

**Option 2.** After the appointment has taken place, you must return to the booking and mark whether the session was attended by the student. **Lime green** represents that the student attended the session.







Title: Hannah Banner - Study Skills - PL Seminar 6

Enquiry Category: Mentoring Appointment Date: Wednesday, 4 October, 2017

Enquirer: Search for...  Hannah Banner

Starts: 10:00 for Select Length or until 11:00

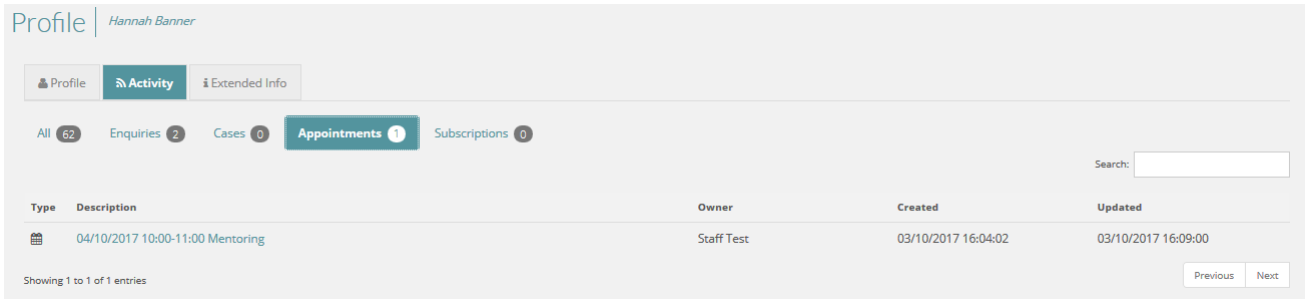
Diary Category: Select a diary category **1.** **2.** Diary Type: Select a diary type

Diary Status:      Email generation   Check to override system email generation

Staff: Add staff **1** Add tutor **0** Room/event details: No Room No Event

## How to: **Book an appointment in your Compass Online calendar**

12. **Please note** that all appointments are recorded against the student's profile. To view the student's appointment history, use the 'find a student' search bar at the top of the screen and click on the **Activity** tab.



### Further details:

You can pre-book appointment slots before booking a student in to them. To do this simply create the appointment as shown in instruction 7 but do not add any students to the record. When you have identified a student for that particular slot, click to edit and add the student's details as per instruction 7c.

If a student cancels a session, simply edit the appointment and select **Cancel Appointment**. This will provide you with a list of reasons for the cancellation that include: Unable to attend, Appointment clash, No longer required, I intend to reschedule and Cancelled by service.

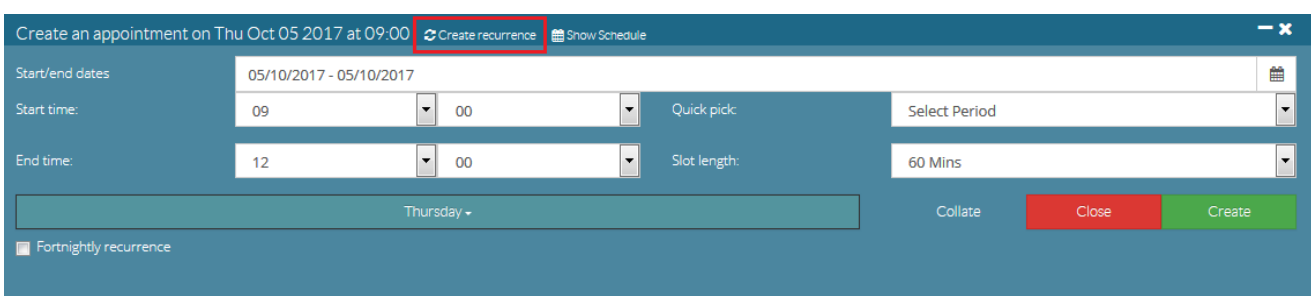
By selecting this, it will remove the student from the appointment, send both you and the student a cancellation email but keep the slot so that you can book another student in to it.

**If you wish to remove the slot completely**, open the appointment slot and select **Delete Appointment** to remove it from your calendar.

### Multiple (consecutive) sessions

You can book multiple sessions without having to add them one by one. If you plan to see students for a morning (for example, 3 sessions from 9am until 12pm) you can use the appointment recurrence feature to add 3 consecutive 1 hour appointments.

1. Click in to your calendar at the time of the first session to view the appointment creator pop-up window. Select the 'Create Recurrence' option at the top of the window – this will cascade a new set of options over the pop-up appointment window:



2. Choose your start and end dates (this should represent the same day), as well as your start time and your end time.

## How to: **Book an appointment in your Compass Online calendar**

3. Select the length of the slot (in most cases this will be 60 minutes).
4. Importantly, also select which day of the week it is.
5. Select 'collate' (to view how many slots will be created) and **Create** to create the slots.
6. Your slots will be created.
7. You can then select each individual appointment slot to change the settings/ add student details or adjust the category to reflect the type of support you will be giving in that session.

**Please note:** it is only when a student is added to the appointment that the appointment confirmation emails are sent.

Please also be aware that if you make a mistake these slots can only be deleted individually so be cautious when using this option.

